

Marketing:**Financial Services Marketing****HQ Course Code # 5006** _____

School Year _____

Term: ____ Fall ____ Spring

CTE Course Code # 5036 _____**½ Credit** _____ **1 Credit** _____ **2-3 Credits** _____

Standards to be completed for ½ credit are identified with one asterisk(*).
 Additional standards to be completed for 1 credit are identified with two asterisks (**). A work-based learning component for 2-3 credits is identified by three asterisks (***).

Student:	Grade:
Teacher:	School:
# of Competencies in Course: ½ credit = 20, with Work-Based Learning = 22, 1 credit = 42, With Work-Based Learning = 44	
# of Competencies Mastered:	
% of Competencies Mastered:	

***Standard 1.0 The student will recognize the types and functions of lending institutions.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
1.1	Examine the different types of financial institutions and their functions			
1.2	Evaluate career opportunities available in the financial services industry			

****Standard 2.0 The student will examine the marketing strategies utilized by financial institutions.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
2.1	Analyze the marketing concept as it relates to financial institutions			
2.2	Identify market segments			
2.3	Analyze marketing mix as it relates to financial institutions			
2.4	Assesses the impact of competition among financial institutions			

****Standard 3.0 The student will demonstrate an understanding of economic concepts and principles in a global economy.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
3.1	Differentiate between the types of economic systems including the interrelationship of business, government and individuals			
3.2	Assess economic concepts globally			
3.3	Analyze the free enterprise system			
3.4	Examine economic indicators and business cycles			
3.5	Demonstrate a knowledge of international trade			
3.6	Evaluate the relationship of cost/profit to supply and demand			
3.7	Evaluate the effects of monetary and fiscal policies on economic decisions			
3.8	Examine the relationship of values/beliefs to economic goals			

***Standard 4.0 The student will explore checking, savings, and investment options offered through lending institutions.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
4.1	Examine the procedures for cashing and issuing checks in a financial institution			
4.2	Investigate the procedures for handling various types of deposits			
4.3	Analyze investment options such as savings accounts, individual retirement accounts, money market accounts, stocks, bonds, etc.			

****Standard 5.0 The student will examine types and sources of capital funding.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
-----------------------	--	---	---------	-------------

5.1	Compare and contrast institutions that provide credit and the types of credit provided		
5.2	Examine the characteristics and requirements for obtaining various types of credit		
5.3	Evaluate the importance of credit monitoring institutions		
5.4	Assess the legal aspects of credit		

****Standard 6.0 The student will examine consumer credit options.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
6.1	Analyze the requirements considered in granting credit			
6.2	Evaluate credit options			
6.3	Analyze the sources and types of capital			
6.4	Examine a financial plan			

****Standard 7.0 The student will analyze technology that relates to financial services marketing.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
7.1	Examine technological applications in financial services			
7.2	Explore computer technology and electronic equipment in offering financial services			

***Standard 8.0 The student will demonstrate organizational and leadership skills.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
8.1	Examine the purpose and principles of DECA			
8.2	Develop leadership skills through class-related regional, state and national activities of DECA			

***Standard 9.0 The student will understand the importance of academic integration in the area of financial services marketing.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
9.1	Utilize proper grammar and writing skills			
9.2	Utilize effective communication skills			
9.3	Assess the value of art and design in financial services			
9.4	Demonstrate an understanding of the properties of real numbers			
9.5	Apply algebraic procedures to solve equations and interpret results			
9.6	Interpret real data			
9.7	Demonstrate competency of rates and other direct and indirect measurements			
9.8	Examine environmental issues in financial services operations			
9.9	Assess the impact of historical events on the financial services industry			
9.10	Explore psychological and sociological patterns of individuals			
9.11	Analyze characteristics of a population			
9.12	Examine legal and ethical issues affecting financial services institutions			
9.13	Evaluate economic principles as they apply to the financial services industry			

*****Standard 10.0 The student will demonstrate financial services marketing principles in a work-based learning experience.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
10.1	Demonstrate interview, application and writing skills necessary for job attainment			
10.2	Compare career options in financial services marketing and the required education and training			

Additional comments:
